

## Company Qualifications:

### Company Background

*iDatix delivers intelligent software solutions that align people, processes and technology. With deeply integrated Business Process Management (BPM), Enterprise Content Management (ECM) and Dynamic Case Management solutions from iDatix, organizations such as Lockheed-Martin, AG First Farm Credit, and Forrest General Hospital have met their business objectives by streamlining their processes and simplifying their workplace.*

**HISTORY** - Launched in 2000 by Founder and CEO, Steve Allen, the company is headquartered in Clearwater, FL. We are active in our community, and we are an equal opportunity employer with a strong commitment to all of our stakeholders – our shareholders, our customers, our employees and our partners. As committed as we are to delivering the best in software solutions, we are equally committed to the quality of implementation and support services that are an integral part of what we offer.

**OFFERING** – Our solutions are built from the ground up to provide comprehensive enterprise-wide process automation that seamlessly integrates with your core business applications and processes. They are used to simplify your work environment by automating interactive tasks while filling the gaps that exist in today's departmental systems and silos. Your employees, business partners and clients are empowered with instant access to documents, data and knowledge in the workplace or from their mobile devices accelerating processes from days to minutes. Our flagship offerings: iSynergy, Progression and iForms create a comprehensive Enterprise Content Management and Business Process Management platform designed to solve any business need. This Solution Suite provides capture of any document in any format, turning paper forms into web-based forms, securing, storing and making them accessible, then integrating that information with your core business applications (such as SAP, Oracle, Sage, etc.) and pushing it through a workflow of your own design using Progression.

**CUSTOMERS** - From Hospitals to Manufacturers, to Financial Institutions, our growing customer base consists of hundreds of clients representing a wide range of vertical industries and applications. We deliver our solutions to these customers through a valuable partner channel as well as through the process automation experts on our professional services team.

**APPROACH** - The right solution will make your workplace simpler and more efficient - not more difficult. We take pride in delivering solutions that are intuitive and customizable by your staff without programming. Our implementations are on-time and on-budget resulting in a complete hand-off to your people so you can be self-sufficient with powerful automation tools. And, most importantly, we are laser focused on seeing you achieve a speedy return on your investment. We measure ourselves on your gains.

**HIGHER PURPOSE** – Our team at iDatix has developed an environment and culture that goes beyond the workplace with a strong commitment to serve our community and enhance our

world. We strive to make products that help our environment by minimizing paper manufacturing and waste and help our customers do more with less through constant innovation. We believe that innovation drives prosperity and our progress is progress for everyone.

## Similar Projects

We implemented our award winning iSynergy Enterprise Content Management (ECM) solution for the city of Tulsa, OK. For several years, Tulsa had experienced difficulty in the timely processing of commercial permits and licenses due to the volume of paper and the number of people and processes involved. Their paper-based system required duplication of each form, plan, and supporting document and was not only cumbersome and error prone but also expensive. Recognizing the need to automate and simplify their workplace, Tulsa's Development Services Department decided to implement an ECM system which would eventually become the standard for the city. Terry O'Malley, Project Manager in the city's Information Technology Department, summed it up: "We have a lot of manual processes, we have a lot of paper coming in, we have a lot of shuffling of that paper. By streamlining and automating these manual processes with iSynergy, we expect to cut our turnaround time in half or more." "After our initial demo to the city, it was clear that the vision of a paperless environment Terry outlined went beyond what traditional ECM solutions provided," said Steve Allen, CEO of iDatix. "We are honored that the city's selection process identified iSynergy as being able to meet those needs." When asked what he thought most impressed city staffers, Stuart said, "I think they were shocked that such a full featured system could be that user-friendly." iSynergy will interface to the city's legacy systems as well, preserving the existing infrastructure while at the same time improving service. "We were all so blown away by how iLink allows you to do some pretty quick integration with legacy systems," says O'Malley. "When iSynergy is rolled out to other departments, it will interface to those systems as well. The sky's the limit, as far as other systems we could integrate with." The Tulsa metropolitan area is estimated to reach one million between 2010 and 2012. As the city grows, the city's services must grow too. iSynergy is projected to support 4,000 city employees, multiple departments, and the processing of millions of documents and thousands of citizen requests per year. O'Malley is confident iSynergy was the right choice. "We're all pretty excited about this" she said. "I think we're looking good."

## Customer References

Past Client Name	Person completing the survey	Phone Number	Email	Project Info	Project Value	Month, Year Completed or Substantially Completed
Arriva Medical	Marc Rothberg	800-700-4442 x3490	<a href="mailto:Marc.Rothberg@arrivamedical.com">Marc.Rothberg@arrivamedical.com</a>	Document management and workflow automation & Eforms	400K-500K	Start: 2011 Last: 2013
Ihi Bupa	Eri K Inove	+45 3342 8272	<a href="mailto:ekre@ihi.com">ekre@ihi.com</a>	Document management and workflow automation	800K-900K	Start: 2010 Last: 2013
Nationwide Title Clearing	Scotty Mcentire	727 771 4000 x207	<a href="mailto:scotty@nwtc.com">scotty@nwtc.com</a>	Document management and workflow automation	400K-500K	Start: 2009 Last: 2013

## **Addresses**

Arriva Medical:  
Arriva Medical LLC  
4252 NW 120th Ave  
Coral Springs FL 33065

Ihi Bupa:  
BUPA Worldwide Corporation  
7001 SW 97th Ave  
Miami FL 33173

Nationwide Title Clearing:  
Nationwide Title Clearing, Inc  
2100 Alt 19 North  
Palm Harbor FL 34683

## **Solution Overview**

The iDatix solution is broken into three primary interaction modules, forms, workflow, and iSynergy. The architecture of our solution is based off of the repository (iSynergy) and all information, metadata structure, and indexes are replicated out to all associated products to minimize configuration. The solution set becomes much larger the more in depth you get as there are some other products we offer for specific uses such as Xtractor for OCR that the everyday user would not likely ever see. The school of thought we came from when developing our solution is to not focus solely on your people, documents, or process but emphasize the intersection of them in an elegant and intuitive solution.

The legacy systems present a challenge whenever a new solution is being implemented. The professional services team at iDatix has had to migrate content and convert metadata and naming conventions from almost every solution on the market. In all cases the documents and metadata are converted into iSynergy through open formats. Any information that cannot be migrated over automatically is brought over and run through automated indexing profiles before the remaining amount has to be sent to manual indexing so that all information is available in one place.

## **Software Modules**

### **SCANDOX - Unified Solution for Distributed, Efficient and Accurate Data Capture**

Offering an intuitive workspace environment, ScanDox is a single capture tool that allows easy and efficient document scanning, sorting and indexing tasks prior to submitting to iSynergy. ScanDox provides true internet transport of documents, and full functionality in a disconnected environment with automatic upload to the iSynergy server when an internet connection is available..

### **BARCODER - Barcode Sheet Creation**

BarCoder allows simple creation of barcode separator sheets for automating the document indexing process. BarCoder also allows execution of database look-up to auto-populate index fields greatly reducing data entry and further ensuring accuracy. BarCoder is also ideal for

customers who wish to scan using a Multi-Function Device (copier, printer, scanner). Sold per workstation.

### **XTRACTOR - iSynergy Recognition Engine**

Xtractor provides the functionality to read barcodes, perform zonal OCR, and conduct advanced forms processing. By implementing Xtractor to “grab” an index value, and performing database look-ups through Data Exchange Service, iSynergy can greatly reduce manual indexing, and provide an easy to use end-to-end business process solution.

### **IDOX ERM - Enterprise Report Management**

iDox is the ERM (Enterprise Report Management) module (technology formerly referred to as COLD) which provides automatic capture and indexing of PDF print streams generated by core line of business/legacy systems. iFORMS - Electronic Forms Our intelligent electronic forms solution, iForms, is easy to create, easy to use and easy to manage. iForms uses your existing web browser and requires no programming to develop and deploy powerful, real-world forms. mCapture Capture items remotely and submit them directly to the repository with our mobile app mCapture, available on Android and Apple devices.

### **ISYNERGY ENTERPRISE SERVER**

This is the heart of the iSynergy suite of products. The iSynergy Server is the main user interface for those wanting to search, retrieve, view, fax, print, email or apply annotations to the documents contained in the iSynergy repository. Full Text Service allows for full text searches across documents stored in the repository. Additionally, the iSynergy Server contains the administration interface for user and/or group management as well as application management. Included with iSynergy is a MultiFunction Service which “breaks” or separates the documents based on the patch codes and stores those documents in iSynergy. Additionally, the Data Exchange Service that comes with iSynergy allows data to be passed between the iSynergy database and any existing ODBC compliant database within an organization. Multi-Index inserter is a plug-in service that works as an extension of Data Exchange Service, allowing creation of a one-to-many index relationship. The Active Directory Integration Service provides automatic synchronization between users and groups within a domain Active Directory and iSynergy.

### **ILINK - Application Linker**

iLink allows core line of business software to be image enabled. Through placement of a customized “button” on top of any existing line of business software iLink allows users to retrieve and scan images, as well as create barcode separator sheets from within that existing application. Setup is simply point and click; no coding or scripting is required. iLink is licensed per workstation.

### **PROGRESSION - Rules-based Workflow**

Progression is the graphical interface rules-based automated workflow module from iDatix. Ad hoc workflow is native to the iSynergy product, however, Progression introduces a new level of workflow through incorporation of business rules and automated trigger points in the business process. Progression is comprised of three modules; the Progression Server, Progression Designer, and Progression Manager with the server licensed as a module at the server device level and Progression Designer and Progression Manager licensed by user.

## Licensing Options

Explain how your solution licensed, i.e. named user, concurrent user, enterprise license, server/processor, Storage capacity, etc. The State may require an enterprise-wide system that supports up to 5,000 users.

In all cases we license bases on named user, concurrent user, or a combination of both. In cases where the total user count rises to above 2000 we will do an enterprise license.

## Estimated Costs

In this situation there would be an enterprise license created. We have two options of enterprise license in this instance it would either be a **one-time \$2.8 million cost with \$560,000 in annual maintenance, or a recurring \$800,000 annual subscription with no annual maintenance.**

The implementation costs of either option would be the same but cannot be determined without more specific requirements and implementation guidelines.

## ECMS Specifications

Document Imaging Specifications		Out of the Box	Customization Required	3 <sup>rd</sup> Party Application	Comments
1.	Does the ECM provide imaging software to import basic scanned documents?	X			
2.	Does the ECM support the following imaging capabilities:				
	Optical Character Recognition (OCR)	X			
	Intelligent Character Recognition (ICR)			X	We have two 3 <sup>rd</sup> party applications which we have developed integrations with which are reusable. This means that even though we use a 3 <sup>rd</sup> party software to perform this it is done so in a streamlined and tested method.
	Optical Mark Recognition (OMR)	X			
	Optical Bar Code Reader (OBR)	X			
	Mobile Capture – smart phones and other mobile devices	X			
3.	Is the system compatible with Multi-functional Devices (MFDs) i.e. copiers, mobile device capture, fax server, email, and file import?	X			
4.	Does the system have the capability to do batch scanning and indexing?	X			
5.	Does the system provide the ability to capture index information from scanning/capture software?	X			
Content Management Specifications		Out of the Box	Customization Required	3 <sup>rd</sup> Party Application	Comments
1.	What kind of navigational capabilities does your solution support:				

	Folders (similar to MS Windows Explorer)		X		
K	Key word search	X			
F	Formal taxonomy using document types and classes	X			
	All of the above		X		
2.	Does your solution support remote access to the ECM system, i.e. for staff that work in the field and have the need to enter documents from the field?	X			
3.	Does your solution provide access to documents on a public-facing online system?	X			The ability to do this is built directly into the solution the only development work would be in creating a portal itself or redirecting a current portal on the web.
4.	Does the ECM support multiple naming and archiving processes?	X			
5.	Does the ECM fully integrate with Microsoft Office applications (Word, Excel, PowerPoint, etc.)?	X			
6.	Does the ECM fully integrate with Microsoft Exchange?	X			
7.	Does your solution support email archiving and management capabilities?	X			
8.	Does the ECM allow access to documents by an Apple iOS or Android device?	X			
9.	Does the ECM allow access to documents via web browser? If so, list the compatible browsers and versions in the Comments section.	X			Internet Explorer Firefox Safari Opera Chrome  For all browser the current and two previous version are support on a rolling basis
10.	How does the solution manage documents with a retention policy?	X			There is a dedicated retention manager that is integrated from end to end with the solution. Documents retention schedules can be based on any metadata stored within the solution
11.	Provide examples of reports that can be used to ensure retention policies are being adhered to.	X			Lifecycle reporting Average Age Document retention schedules
12.	Search Capabilities				
	Will the system accommodate full text OCR to search for and retrieve files?	X			
	Does the ECM offer web-based and desktop client interface search and retrieval?	X			
	Does the ECM accommodate "Full Text Indexing" (i.e. OCR) to search for and retrieve files?	X			
	Does the ECM allow users to configure custom searches that they commonly use?	X			
<b>Automated Workflow Specifications</b>		<b>Out of the Box</b>	<b>Customization Required</b>	<b>3<sup>rd</sup> Party Application</b>	<b>Comments</b>
1.	Does your ECMS support document-centric, author-review-approve automated workflow capabilities?	X			

2.	Does your ECMS support workflow automation for processing:				
	E-forms for internal purposes	X			
	E-forms for external customer purposes	X			
	Work items (documents, reports, etc.)	X			
	Automatic notifications and emails	X			
	Workflow status tracking	X			
3.	Does the system allow users to perform workflow activities using a standard web browser such as Internet Explorer and Mozilla Firefox?	X			Can be performed on: Internet Explorer Firefox Safari Opera Chrome
4.	Does workflow allow users to define conditions?	X			Conditions can be defined by any Meta Data that is within the solution or accessible outside the solution through database or web services connections
5.	Can workflow be automated for a specific document type and workflow template?	X			The entire workflow is built around the convention of a binder of associated documents which are all needed to accomplish work effectively. In developing it this the appearance or altering of documents can be used to trigger workflow at any time.
6.	Does the workflow include E-signature capabilities?	X			Full digital signature through touchpad devices and e-signature are supported
<b>Records Management Specification</b>		<b>Out of the Box</b>	<b>Customization Required</b>	<b>3<sup>rd</sup> Party Application</b>	<b>Comments</b>
1.	Include the use of back end migration to optical storage or similar technology that meets the State of Montana legislative compliance requirement for permanent records storage of documents. There should be assurance that records stored in the system cannot be altered.	X			
2.	Create, edit and manage a corporate "file plan" / records retention schedule, which contains information used to classify records.	X			
3.	Create and manage the record folders (and folder volumes) that are available to help organize the file plan.	X			
4.	Configure the system to easily declare objects as records in native authoring tools and specify which object classes and properties to manage.	X			
5.	Create and manage records retention rules.	X			
6.	Create and manage physical boxes, folders and records.	X			IN order to do this automated workflows would be set up to track the statuses of boxes which would also interface with physical barcode scanner for tracking the movement and location of these records.
7.	Search for categories, folders and records.	X			
8.	Place holds against record categories or search results.	X			

9.	Identify appropriate metadata for all formats and sources.	X			
10.	Manage various record image / formats in an integrated manner.	X			
11.	Maintain the relationships between records and files, between file series and the file plan.	X			
12.	Retrieve information for personal use or to comply with Freedom of Information Act / discovery requests.	X			
13.	Construct and manage audit trails and track system usage by department and user.	X			
14.	Manage the integrity and reliability of records once they have been declared as such.	X			
15.	Identify records that are due for disposal when their prescribed retention periods elapse, managing the disposal process.	X			
16.	Provide a seamless integration of the ERMS (providing the records management logic) with an ECMS,	X			
17.	Records Manager Application will be a 100% Web-browser based application.		X		Currently iRetention is a thick client but could be transferred over to a web interface with some development work if this was required.
18.	Views file plans and retention and disposition policies.	X			
19.	Provide interface capabilities to existing systems that create electronic records, via an application program interface (API) to integrate properly with the proposed ECMS.	X			
20.	ERP integration: support enterprise resource planning (ERP) systems APIs.	X			We have successfully integrated in the past with Lawson, Sap, SAGE, Oracle, & other ERPs
21.	Typical Reports: Including, but limited to, the following:				
	o Ready for Destruction report	X			
	o Future Disposition Schedules report	X			
22.	Maintain the relationships between records and files, between file series and the file plan.	X			
23.	Retrieve information to comply with Freedom of Information Act / discovery requests.	X			
24.	Associate the contextual and structural data within a document.	X			
25.	Construct and manage audit trails and track system usage by department and user.	X			
26.	Manage the integrity and reliability of records once they have been declared as such.	X			
27.	Identify records that are due for disposal when their prescribed retention periods elapse, managing the disposal process.	X			
<b>E-Form Specifications</b>		<b>Out of the Box</b>	<b>Customization Required</b>	<b>3<sup>rd</sup> Party Application</b>	<b>Comments</b>
1.	Do your E-forms support the need to retain the look and feel of paper forms?	X			
2.	Do your E-forms support E-signatures?	X			
3.	Does your solution support public-facing E-forms that can be filled out and submitted on line?	X			



## **Additional Information**

Attached to this document is a product overview with more detailed information of all product offerings.

### **General Vendor Information**

#### **Vendor Prime Contact:**

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- Organization's Internet Home Page: [www.idatix.com](http://www.idatix.com)

Corporate Headquarters: 1499 Gulf to Bay Boulevard, Clearwater FL, 33755

Field Support Office closest to Inova: iDatix Headquarters

Programming/Technical Support Personnel: iDatix Headquarters

Field Engineering: iDatix Headquarters

Client Education Personnel: iDatix Headquarters

Consulting Services Personnel: iDatix Headquarters